FINANCIAL DOCUMENTS

Use the following list as a guide to help determine the financial status of your loved one. The financial document inventory is one of the most important when planning ahead. Don't wait until there is a crisis.

In a planning ahead, you may want to think about future access to these accounts by power of attorney or becoming a joint tenant.

Indicate the applicable items and list the account numbers and contact.

<u>ITEM</u>	ACCOUNT NUMBER	CONTACT (name, address & phone)
[] Checking Account		
[] Checking Account		
[] Savings Account		
[] Savings Account		
[] Retirement Account		
[] Pension		
[] Stocks/Bonds		
[] Savings Bonds		
[] Investments		
[] Investments		
Social Security		
[] Income Tax Statements		
[]		
[]		
[]		
[]		
[]		
[]		
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FINANCIAL DOCUMENTS (continued)

<u>PAYMENTS</u>	ACCOUNT NUMBER	<u>CONTACT</u>
[] Mortgage/lease		
[] Property Taxes		
[] Car Payment		
[] Hospital Bills		
[] Doctor's Bills		
[] Doctor's Bills		
[] Telephone Bill		
[] Utility Bill		
[] Insurance (health)		
[] Insurance (home)		
[] Insurance (car)		
[] Credit Card		
[] Credit Card		
[] Credit Card		
[]		